Membership Cards

Each new member must complete both the front and the back of the membership card for the correct retirement system. Someone other than a designated beneficiary must witness the member's signature. For more information about membership cards, refer to the Membership Cards section under the specific retirement system.

The members' names are input from the card and MPERA will request missing membership cards in a quarterly report to the employer.

Working retirees in PERS, SRS and FURS are not considered new members and should not complete a membership card. See the System Requirements for Working Retirees for further information

Correcting Social Security Numbers Online

If an incorrect social security number has been reported for an employee, use the following steps to correct the information.

Create Report Users - Members

1. Locate and highlight the employee with the incorrect social security number.
2. Click the ADD EMPLOYEE button on the bottom of the screen. This will create a blank line below the highlighted member.
3. Type in the correct social security number. Verify entry before tabbing to new field.
4. Use the above line to verify remaining data that needs to be input for the employee. The hire date will need to be the same. Be sure to use current payroll information for earnings, contributions and hours.
5. Click on Save Data.
6. Highlight incorrect employee information and click the DELETE EMPLOYEE button.
7. Complete payroll report and submit payment.
8. Notify MPERA of the error so internal corrections can be made. If MPERA is not contacted directly, the employee's payroll information will remain in two separate accounts causing potential problems for the employee at a later date.
9. Once the corrected payroll is posted, MPERA will combine the accounts under the correct social security number.

If MPERA is not contacted directly regarding incorrect social security numbers, the employee's payroll information will remain in two separate accounts causing potential problems for the employee at a later date.

Correcting Social Security Numbers Online

Create Report Users - Non-Contributing Employees

1. Locate the employee with the incorrect social security number.
2. Click the ADD button on the bottom of the screen. This will open a blank edit screen
3. Type in the correct social security number and all other payroll and employment information.
4. Click on Save Data.
5. Highlight incorrect employee information and click the DELETE button.
6. Complete payroll report.
7. Notify MPERA of the error so internal corrections can be made. If MPERA is not contacted directly, the employee's payroll information will remain in two separate accounts causing potential problems for the employee at a later date.

Transfer File Users - Members and Non-Contr Employees

- Correct the social security number in your internal system prior to creating your payroll file.
- Complete payroll report and submit payment.
- Notify MPERA of the error so we can make our internal corrections. If MPERA is not notified, the employee's information will remain in two separate accounts. This may cause potential problems for the employee at a later date.
- Once the corrected payroll is posted, MPERA will combine the accounts under the correct social security number.

Summer Reporting

DO NOT combine reports or change your payroll reporting period without pre-approval from MPERA

Some agencies, such as School Districts and Special Ed Co-ops, do not have paydays during certain times of the year. Agencies are still required to send notification for those paydays. This can be done by checking the No File for Report Period checkbox located in the Create New Report Period pop-up window for the specific paydays and then clicking the OK button.

Paper reporters must notify MPERA of any changes prior to the final report of the fiscal year.

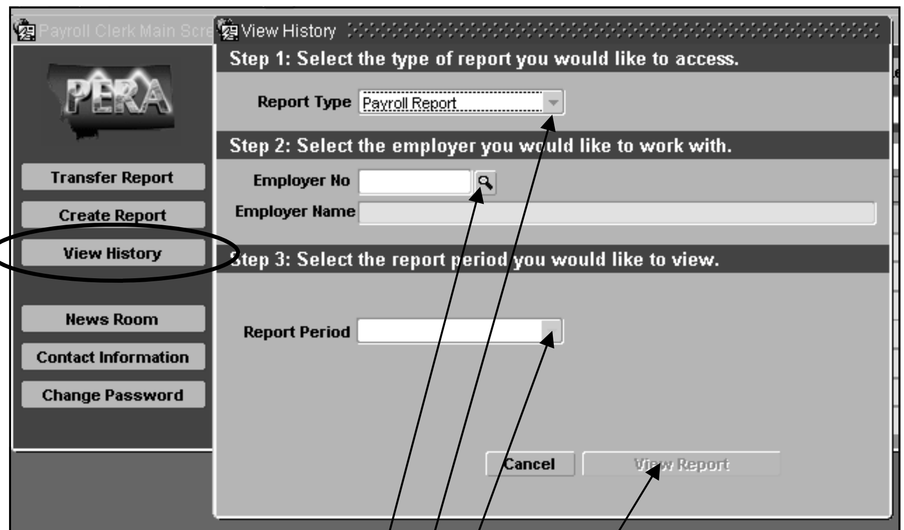
Reporting Outside Normal Schedule

Agencies **must** report each payroll according to the schedule they initially provide. Changes to this schedule are only allowed for extenuating circumstances and pursuant to pre-approval by MPERA. If your payroll frequency will vary from the normal schedule, contact MPERA for the pre-approval prior to submitting any payrolls.

Payroll History

Previous payroll reports can be accessed using the Payroll History option from the MPERA Payroll Clerk Main Screen. All payroll reports from 12/2001 may be accessed from the MPERA Web Reporting site.

Click on the VIEW HISTORY button.



Step 1: Select the type of report.

Step 2: Select the employer.

Step 3: Select the report period.

Click on the VIEW REPORT button.

ORP Payroll Reporting Information – Montana University System Only

To report Optional Retirement Plan (ORP) payroll information, use the same methods for regular payroll reporting. Refer to Chapter 3 - **Payroll Reports** for directions on how to report.

Printing the Payroll Summary Screen

At the **Payroll Summary tab**, press the "Print Screen" key on the keyboard. It is normally found above the insert key. Depending on printer configuration, this may or may not actually print a copy. It will, however, capture an image and place it on the clipboard to be copied.

- Open either Microsoft Word or WordPerfect.
- At a blank page, click on 'Edit' on the toolbar, select 'Paste' from the drop-down menu. This will copy the summary page into the document.
- Click on 'File' on the toolbar and select 'Print' from the drop-down screen to print the summary page.
- Attach the summary page to the payment when submitting to MPERA.

Service Purchase Contributions

IRS rules allow employees to purchase service by making additional contributions.

1. The additional contributions needed to purchase service may be made in two methods:

   a. After-tax payments made directly to MPERA by the member, or

   b. Pre-tax payments through payroll deduction. (This method may only be used by active members/employees who complete a service purchase contract.)

   - A service purchase contract cannot be terminated except by death or termination of employment.
   - Payment schedules cannot be less than three months or more than 60 months (five years).
   - Employees and employers must complete the *Payroll Deduction Form* which authorizes the service purchase deductions. It is a three-part form: one copy for the employee, one for the employer, and one to be returned immediately to MPERA. A sample of this form and instructions are in the Service Purchase section for each retirement system.

2. **Do not** deduct payments without an approved service purchase contract. The completed contract must be received by MPERA prior to reporting.

To receive a cost statement and for information about initiating a service purchase contract, advise your employees to contact MPERA in writing.

ACH Authorization Form

ACH authorization forms may be printed from the MPERA website.

- From mpera.mt.gov click on the Publications menu.
- Click on Forms/Employer Forms/ACH Authorization Form.
- Complete form, print it, attach a copy of voided check and either mail or fax to MPERA.

System Exit

To exit MPERA Web Reporting, choose one of the following options:

- Click on the "open door" button on the toolbar.
- Click on the "X" button in the upper right corner of the screen.
- Click 'File' on the toolbar and select 'Exit' from the drop down menu.

Member Address Reporting

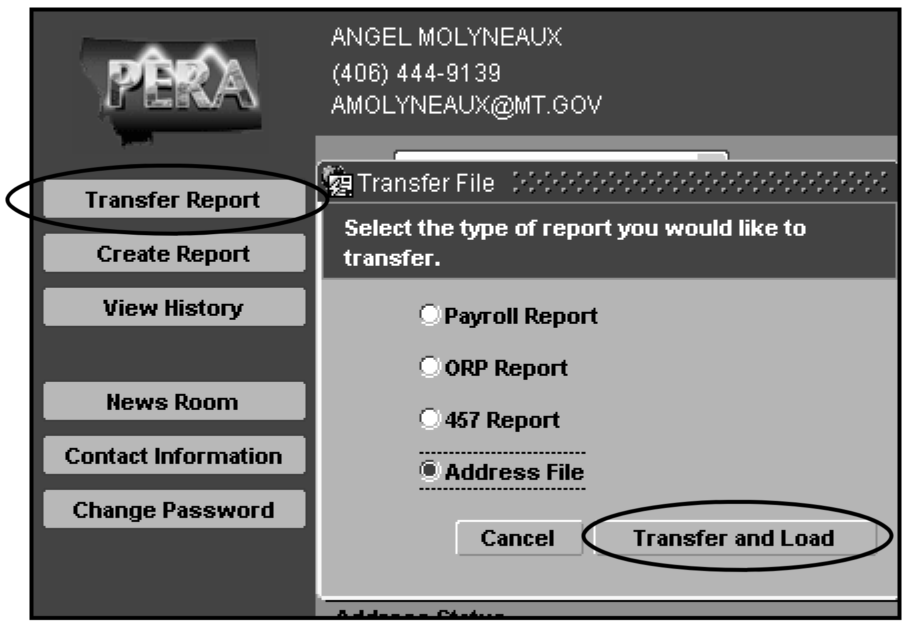
Each employer is required to provide current address information to MPERA on a monthly basis.

Maintaining current member addresses allows MPERA to provide retirement information to members, and ease the burden on you, the employer. MPERA's Web Reporting allows the input of member addresses which updates our internal database. **Only report addresses for contributing employees.**

Using MPERA's Web Reporting, you can both transfer and upload an electronic file and edit addresses directly on the website.

See page 4 of the Payroll Reports chapter for instructions to log on to the website. On the left hand side of the MPERA Payroll Clerk Main Screen click on the TRANSFER REPORT button.

Transfer and Load Member Address Method



Select Address File and click on the TRANSFER AND LOAD button. The following window will be displayed:

Select the BROWSE button.

Member Address Reporting Continued

Navigate through the directory structure and locate the address file for transfer. Select the file by double clicking on it. The file path will appear in the BROWSE window.

Click on the SUBMIT button and wait for the screen which confirms the file has been successfully transferred, loaded and validated. If your address file loads successfully with no errors, you are done and no further action is required.

If you receive any error messages, you must correct the errors and revalidate your address file. To correct errors, follow the instruction below on editing addresses directly on the web.

Edit Addresses Directly on the Web

In the address section of the MPERA Payroll Clerk Main Screen, click on the blue link under the Status column to access address information. To change the information, click on the Edit button to the left of the members' SSN. After you have updated the necessary information, click on Validate Addresses. You may view errors by clicking on the **Validation Messages** by the **Member tab**. Correct any errors and revalidate the address file.

If an employee terminates employment, delete them from your address file. Highlight the member and click on Delete Selected Member. Once deleted, revalidate your file.

Addresses have been successfully submitted when the Status box reads "Ready to be Posted".

***Do not** use membership cards for address changes.*

For agencies who do not report online, send updated address reports to MPERA on a monthly basis.

If you need assistance, contact MPERA.